



**WEDNESDAY, SEPTEMBER 26, 2018**

11:00 AM – 8:00 PM

**REGISTRATION**

South Loggia

12:00 – 2:00 PM

**NETWORKING LUNCH**

Mediterranean Courtyard

Advisors Only

2:00 PM – 4:00 PM

**PRE-CONFERENCE SESSION**

Ponce 3

Factor Effect: Turning Theory into Action - Understanding Factors & Ways to Implement in Portfolio Construction

**CFP I-W**

**Vincent de Martel**, Solutions Strategist, Invesco Global Solutions

**Duy Nguyen**, Chief Investment Officer and Portfolio Manager, Invesco Global Solutions Development & Implementation

Moderator: **Jeff Welday**, Executive Vice President, National Sales Director, Wirehouse Division, Invesco

**Drew Freides**, UBS Private Wealth Management

**Raj Sharma**, Merrill Lynch - Private Banking & Investment Group

Interviewer: **Jack Otter**, Dow Jones Wealth & Asset Management

5:30 PM – 6:30 PM

**COCKTAIL RECEPTION**

Mediterranean Ballroom

6:30 PM – 8:30 PM

**WELCOME DINNER**

Venetian Ballroom

Never Quit: The Story of a Life Built on Successful Missions

**Robert O'Neill**, Former SEAL Team Six Leader, Naval Special Warfare Development Group

8:30 PM – 10:00 PM

**TOP 100 COCKTAIL RECEPTION**

Champagne Toast (for ranked advisors past & present)

**THURSDAY, SEPTEMBER 27, 2018**

8:00 AM – 6:00 PM

**REGISTRATION / INFORMATION DESK**

South Loggia

Mediterranean Ballroom

Breakfast

Attendees of the Barron's 100 Summit can apply for 8 CE CFP credits & 8 CE hours (toward CIMA / CIMC / CPWA designations). Please scan your badge at the door of the session.



9:00 AM – 9:40 AM Venetian Ballroom	<b>GENERAL SESSION</b> Fast Forward <b>Marcie Behman</b> , Merrill Lynch - Private Banking & Investment Group <b>Craig Findley</b> , UBS Financial Services Inc. Presenter & Interviewer: <b>Jason Chandler</b> , Co-Head of Investment Platforms and Solutions, UBS Global Wealth Management	
9:40 AM – 9:55 AM Mediterranean Ballroom	<b>REFRESHMENT BREAK</b>	
9:55 AM – 10:45 AM	<b>BREAKOUTS</b>	
Ponce 3	Service of the Future: Targeting UHNW in the Digital Age <b>Frank Cooper</b> , Chief Marketing Officer, BlackRock Interviewer: <b>Sterling Shea</b> , Head of Dow Jones Wealth & Asset Management	<b>I-W</b>
Ponce 4	The Future of Marketing: Building the Personal Brand of Your Business <b>Louise Gunderson</b> , UBS Financial Services Inc. <b>Todd Silaika</b> , Merrill Lynch Wealth Management Moderator: <b>Ray Sclafani</b> , CEO, ClientWise	
Ponce 5	Future-izing Portfolios: Leveraging Machine Learning for a New Sector Investment Reality <b>Matthew Bartolini</b> , Head of SPDR Americas Research, State Street Global Advisors <b>Jennifer Martin</b> , Equity Portfolio Specialist, T. Rowe Price Moderator: <b>Katie Schoen</b> , Manager, PWM Equity and Fixed Income Research, Baird	<b>CFP I-W</b>
Gold Room	Emerging Markets & Assessing the Global Opportunity that Non-US Companies Can Provide <b>Tim Horsburgh</b> , Investment Strategist, OppenheimerFunds <b>Chris Huemmer</b> , Senior Investment Strategist, FlexShares Moderator: <b>Bob Rose</b> , Executive Editor, Barron's	<b>CFP I-W</b>
10:45 AM – 10:55 AM Mediterranean Ballroom	<b>REFRESHMENT BREAK</b>	

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10:55 AM – 11:45 AM

## BREAKOUTS

Ponce 3

Platforms of the Future

CFP I-W

**Ken Cella**, Head of Client Strategies Group, Edward Jones

**Joe Curtin**, Head of Global Portfolio Solutions & Institutional Investments, Bank of America

**Ian MacEachern**, Managing Director, Head of Investment Products, Wells Fargo

Moderator: **Jack Otter**, Dow Jones Wealth & Asset Management

Ponce 4

Assessing the Business Health of Your Practice

**Mark Douglass**, Morgan Stanley Private Wealth Management

**Brian Tramontano**, Merrill Lynch Wealth Management

Moderator: **Eric Mogelof**, Managing Director, Head of US Wealth Management, PIMCO

Ponce 5

The Future of Investment Advice

CFP I-W

**Brett Mossman**, Managing Director, Member of BlackRock Global Client Group, Head of BlackRock's Portfolio Consulting Services Group

Moderator: **Mike Greene**, SVP, Advisor Business Development and Financial Planning, Ameriprise Financial Services, Inc.

Gold Room

ROI of Art

CFP I-W

**Anita Heriot**, President, Pall Mall Art Advisors

11:45 AM – 12:00 PM

## REFRESHMENT BREAK

Mediterranean Ballroom

12:00 PM – 1:00 PM

## LUNCH

Open Seating

1:00 PM – 1:50 PM

## GENERAL SESSION

Venetian Ballroom

Trump & Global Markets: A Definitive Analysis on the Eve of the Crucial Midterm Elections

CFP I-W

**John Emerson**, Vice Chairman, Capital Group International, Inc. and Former US Ambassador to Germany

**Matt Miller**, Partner and Political Economist, Capital Group; Former White House Senior Advisor

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Issued 9/24/2018 at 3:11:06 PM



1:50 PM – 2:05 PM	<b>REFRESHMENT BREAK</b>	
Mediterranean Ballroom		
2:05 PM – 2:55 PM	<b>BREAKOUT</b>	
Ponce 3	Decoding Your Health <b>Chris Johnson</b> , CEO & Founder, On Target Living	
Ponce 4	Lessons in Completing Your Business Succession & What's Next <b>Shelley Bergman</b> , Morgan Stanley Wealth Management Moderator: <b>A.J. Fechter</b> , Morgan Stanley Private Wealth Management	
Ponce 5	Disruptive Technology & Innovation: An Opportunity for Growth <b>Manish Gupta</b> , Associate Portfolio Manager, Senior Research Analyst, First Eagle Funds <b>Michael Lippert</b> , J.D., Vice President, Portfolio Manager, Baron Funds Moderator: <b>Bill Grous</b> , Alex Brown, a division of Raymond James	CFP I-W
Gold Room	Replicating Private Equity <b>Kurt Nelson</b> , Partner, SummerHaven Index Management <b>Erik Stafford</b> , Professor, Harvard Business School (Sponsored by USCF) Moderator: <b>Joe Montgomery</b> , Wells Fargo Advisors	CFP I-W
2:55 PM – 3:05 PM	<b>REFRESHMENT BREAK</b>	
3:05 PM – 3:55 PM	<b>BREAKOUTS</b>	
Ponce 3	Pitfalls, Perils and Self Inflicted Wounds: Helping Clients Avoid Emotional Investing <b>Chris Davis</b> , Chairman and Portfolio Manager, Davis Advisors	CFP I-W
Ponce 4	The Future of Family Dynamics: Aging Client vs. Millennial Client Needset <b>Nelrae Pasha Ali</b> , Wells Fargo Advisors <b>Julie Kelly</b> , Edward Jones <b>Alyssa Moeder</b> , Merrill Lynch - Private Banking & Investment Group <b>Steve Samuels</b> , Managing Director, Bank of America Merrill Lynch	I-W

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Ponce 5 Evolution of Advisors Alpha: From Portfolios to People CFP I-W  
**Mike DiJoseph**, Investment Analyst, Vanguard Investment Strategy Group

Gold Room The Convergence of HealthCare & Financial Planning CFP I-W  
**Peter Stahl**, President, Bedrock Business Results, LLC

3:55 PM – 4:10 PM **REFRESHMENT BREAK**

Mediterranean Ballroom

4:10 PM – 5:00 PM **GENERAL SESSION**

Venetian Ballroom

Future of Entrepreneurial Spirit  
**Alexis Ohanian**, Co-Founder of Reddit and Initialized Capital  
 Interviewer: **Sterling Shea**, Head of Dow Jones Wealth and Asset Management

5:00 PM – 6:00 PM **COCKTAIL RECEPTION**

Mediterranean Ballroom

**FRIDAY, SEPTEMBER 28, 2018**

8:00 AM – 11:00 AM **REGISTRATION / INFORMATION DESK**

South Loggia

Mediterranean Ballroom Breakfast

9:00 AM – 9:40 AM **GENERAL SESSION**

Venetian Ballroom

Future of Advice  
**Andy Sieg**, Head of Merrill Lynch Wealth Management

9:40 AM – 9:50 AM **REFRESHMENT BREAK**

Mediterranean Ballroom

9:50 AM – 10:40 AM **GENERAL SESSION**

Venetian Ballroom

Digital Assets & Cryptocurrency: The Road Ahead CFP I-W  
**Kristina Hooper**, Chief Global Market Strategist, Invesco  
**Jan van Eck**, CEO, VanEck  
 Moderator: **Sue Wilson-Perez**, EVP, Wealth Management Solutions, Ameriprise

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10:40 AM – 10:50 AM

Mediterranean Ballroom

**REFRESHMENT BREAK**

10:50 AM – 11:35 AM

Venetian Ballroom

**GENERAL SESSION**

Welcome to the SuperHuman Era: The Future of Human Machine Interface

**Jody Medich**, Director of Design, Singularity University Labs

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